DOCUMENT RESUME

ED 423 808 HE 031 656

AUTHOR	Murabito, William J.
TITLE	Student Migration & the State University: Analysis, Strategies & Recommendations.
INSTITUTION	New York State Univ. System, Albany.
PUB DATE	1996-10-24
NOTE	38p.
PUB TYPE	Reports - Evaluative (142)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	*College Choice; Educational Trends; *Enrollment Management; Higher Education; In State Students; Long Range Planning; Out of State Students; *School Holding Power; *State Universities; Strategic Planning; *Student Recruitment; Trend Analysis
IDENTIFIERS	*State University of New York

ABSTRACT

This study sought to determine why significant numbers of potential students at the State University of New York (SUNY) were enrolling in higher education facilities out-of-state and in private institutions. The study's work group participants included system and campus experts in the areas of academics, policy analysis, institutional research, student access, enrollment management, marketing, transfer and articulation, student affairs/campus life, revenue and tuition issues, financial aid, university relations, and secondary guidance. Findings are reported under the following categories: the extent of student migration from New York State; characteristics of out-of-state institutions selected by New York students; why students bypass SUNY; expansion opportunities for SUNY; student perceptions of SUNY; results of a student opinion survey; and system administration support and campus enrollment management. Case studies at SUNY (Brockport) and SUNY (Potsdam) offer examples of a successful financial aid model and a successful enrollment turnaround effort. An appendix lists specific recommendations, both short term and longer term, concerning the relationship of enrollment management to marketing, academics, and transfer/articulation. A list of work group members is also appended. (DB)

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Student Migration & The State University

Analysis, Strategies & Recommendations

1996

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Student Migration and the Stat
Analysis, Strategies, Recomn

A Report Submitted to the State University
Buffalo, New York
October 24, 1996

Submitted by:

William J. Murabito
Associate Vice Chancellor for
Student Affairs

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Preface:

State University Requests a Formal Review of Student Migration

At the February 27, 1996 meeting of the State University of New York Board of Trustees, Chairman Thomas F. Egan requested that System Administration explore the feasibility of establishing a Chancellor's Student Out-Migration Study Team. Subsequently, the Office of University Relations and the Division of Student Affairs and Special Programs were charged to coordinate this project.

This resulted in the creation of a two-tier team consisting of a State University Student Migration Steering Committee drawn from the ranks of senior campus administrators including presidents, and a State University Student Migration Work Group, consisting of system practitioners and experts. The teams' charge stated: "A number of New York State high school graduates are choosing to attend college outside of New York State. Though New York institutions enroll out-of-state students, we experience a net loss when comparing in- and out-migration...it is to the benefit of New York State to enroll more of these students, especially those who have excellent academic credentials." The research soon expanded to include students choosing the independent sector, and out-of-state and international students who might be recruited to the University. The report that follows sets forth analysis and recommendations of the Work Group. Best practices for campuses and recommendations for campus enrollment managers are identified in Appendix A.

Enrollment Management

University enrollment management has changed in character, becoming considerably more complex than the comparatively basic admissions practices of the fifties, sixties, and seventies. The mission of enrollment managers expanded to include not only recruitment and marketing, but also financial aid, retention, sophisticated tracking of acceptance and enrollment patterns, and the establishment of campus-wide task forces to garner support from University alumni, business and corporate partners, and military and community programs. In addition, enrollment managers worked toward excellence and diversity in class composition, sought supplementary funding for campus merit scholarships, and routinely provided updates and admissions notification to candidates.

As enrollment management grew more sophisticated and multi-faceted, recruitment programs became more competitive, not only within State University, but nationwide. *Principles and Possibilities: New Approaches to SUNY Revenue and Tuition*,[1] made the point that the University wished to preserve access for New York State students. It also stated that those students capable of academic distinction were worth retaining–not only from the standpoint of mission and service, but also because they were capable of establishing a committed and revenue-producing alumni network that potentially could enrich the University in future years.

State University historically has been, and still is, committed to access for all New Yorkers, regardless of their level of academic proficiency upon entry. The community college sector with its full opportunity admissions policy and the Educational Opportunity Program have served as educational gateways for all citizens. Most campuses aggressively court academically talented students, as well, and competition for the top students so wanted by State University campuses has never been keener. Yet State University campuses, with their mostly-small endowments and limited mechanisms for providing merit scholarships, face a particularly uphill climb in their quest to attract and retain top-performing students. The University will need to increase its efforts in these areas.

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[1]State University Board of Trustees' Operating Revenue and Tuition Committee Report, October 1995

University Capacity

Increasing enrollments will have a direct impact on the capability of campuses to accommodate more students in the existing academic and residential spaces. A review of peak enrollment levels experienced by campuses supports the proposition that most campuses currently are able to accommodate increased numbers of students. Through their planning processes, campuses will need to deal with such issues as academic utilization, incremental costs, scheduling, programmatic requirements, and community clinical/internship capacity. This is a complex issue, but space needs should not be viewed as a major obstacle for campuses as they plan to accommodate increasing enrollments.

State University's Priorities

Clearly, the University's first priority must remain the enrollment of New York State students. When New Yorkers study elsewhere, the problem of two- or four-year displacement becomes potentially greater because of the known pattern of migrating students to remain in their host states following graduation. In these cases, the migration of a New York student often translates to the permanent loss of a citizen/taxpayer in whom the state already has invested significant sums during the course of a K-12 public education. This is of particular concern when compared to the increasing enrollment trends in states with growing populations. This type of student movement represents not only a significant reduction in University revenues, but also a permanent diminution of the state tax base, the future of commerce, the arts and sciences, and philanthropy (including support of the State University) in New York. It is crucial for State University to do whatever it can to stem the migration of its resident students to other states.

At the same time, State University also must optimize, when it can, a compensatory trend: that of out-of-state students migrating from their home states to attend campuses within the University system. The current student exchange ratio suggests that 4.6 percent more students leave New York than come into the state for college study.[2] Because it is in the University's best interests for campuses to operate at capacity, it is necessary to ask hard questions about which students they ought to recruit in addition to New Yorkers, and whether they ought not to focus on quality candidates previously untargeted by the University: the untapped pools of out-of-state and international students.

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[2]U.S. Department of Education; this includes students attending public, private, and independent schools

State University also should begin, for the purpose of broadly offering the advantage of a New York State higher education, to work toward expanding the definition of a "New York State resident." Many families work in New York State and pay New York taxes, but live just outside state boundaries. When opportunities are available to form intellectual and social affiliations with out-of-state students, such exposure will benefit greatly New Yorkers who must adapt to working in a national- and world-market economy. The time has come for us to view out-of-state students as allies and potential New Yorkers (recognizing that as New Yorkers who attend school in Boston likely will remain in Massachusetts, Massachusetts residents who attend college in New York likely will remain here). Throughout its history, State University's tuition structure and admissions practices have fostered an inflexible two-tier system–based primarily on residence and nonresidence–that ultimately may have worked against its fiscal health and the diversity of its student profile. It is time to reexamine this system, while taking steps to preserve program access for state residents.

It is obvious that an enhancement of this market would serve the State University community well; many benefits accrue to New York's resident students, faculty, and staff when there is a healthy influx of out-of-state and international students. These advantages include:

- the infusion of needed revenues[3] that potentially can decrease the tuition/fee burden on each student,
- a more cosmopolitan academic and social atmosphere,
- overall higher academic standards,
- an enhanced alumni network, and
- "good will" in border communities serving unique categories of out-of-staters, such as those who live just minutes from State University campuses, and those who reside out-of-state but work in New York and pay New York State taxes.

Certain northeastern (non-New York) and mid-Atlantic state students should be targeted to receive State University's message of access and excellence.

Should State University's Trustees (and eventually, New York State's Legislature) launch initiatives to encourage out-of-state enrollment or to change the definition of students eligible to

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[3] Even if certain categories of out-of-state students eventually are given an in-state rate, however, their financial need may be higher, because they will not qualify for New York State assistance programs (though some may receive benefits from their states of origin); out-of-state students should be viewed as "full paying" customers.

receive an in-state tuition rate, there are established precedents in these areas. In order to stay competitive with low-priced Texas border colleges, the New Mexico Legislature has enacted provisions that will allow Texans living within a 135-mile radius of a New Mexico campus to qualify for New Mexico's in-state tuition rate.[4] Other states have stopped short of extending residency to border out-of-staters, but they acknowledge that border competition is intense. The University of West Florida, for example, must compete with the University of South Alabama and Troy State University in Alabama, both inexpensive campuses that attract Floridians with tuition that costs them about the same as their in-state rate.[5] As part of the University of Wisconsin's recent strategic planning exercise, they decided to reduce out-of-state tuition charges to Illinois students. Currently, Wisconsin has full reciprocity with Minnesota; students pay their in-state rate when they attend a campus in the host state.[6]

Research Commences

On April 29, 1996 the State University Student Migration Work Group held its first meeting to consider why significant numbers of the University's students were enrolling in higher education facilities out-of-state. The loss of State University students to private institutions also was discussed, as were measures the University might take to curtail the loss of students.

Participants included system and campus experts from all sectors in the areas of academics, policy analysis, institutional research, student access, enrollment management, marketing, transfer and articulation, student affairs/campus life, revenue and tuition issues, financial aid, university relations, and secondary guidance. The initial discussion was open-ended and included a review of existing University data as well as brainstorming in the participants' areas of expertise. For initial

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[4] *The Chronicle of Higher Education Almanac*, Sept. 2, 1996, p. 78.

[5] Office of Budget and Analysis, Florida State University Administration

[6] The University of Wisconsin is the net gainer (5,000 students); Minnesotans are questioning the value of such reciprocity, as they currently are under-enrolled and no longer need a "safety valve" for excess enrollment. In another area, Wisconsin is withdrawing its law program from reciprocity, placing it in the same "protected" status as its medical and veterinary science programs; in other words, out-of-staters may be admitted, but they pay the out-of-state tuition rate. (Daniel Layzell, Director of the Office of Policy Analysis and Research, University of Wisconsin System Administration)

review, issues were divided into three domains:

1) Enrollment Management
2) Campus Life/Academics, and
3) State Characteristics/Public Policy.

Methodologies for compiling research, extrapolating data, and devising recommendations for action were proposed and evaluated. Determinations were made to compile institutional research, both system- and campus-based; to establish a list of concerns within domains; to frame background questions, research, and recommended action items for review by the Student Migration Steering Committee; to talk with peer institutions in other states regarding measures, practices, and shared perceptions; and to establish some priorities for external research and marketing specialists who will be charged with conducting focus groups and designing specialized analytical instruments. Though the University is home to several reputable research consortia, we recommend using external teams for several reasons: many marketing research techniques and enrollment management tools are newly developed or still evolving. In addition, some valuable analysis techniques require the use of professionals not associated with the University. To ensure serviceable results, it was determined that focus group exercises and certain market analyses in sensitive areas should, therefore, be conducted by external experts.

A work meeting for System Administration experts was held on May 10, 1996, at which time a main focus was the development of marketing and other programs targeted to prospective students with the intent of emphasizing the historical continuity, opportunity, and quality of University campuses.

On June 5, 1996, the State University Work Group held a follow-up meeting to present research and preliminary conclusions and recommendations to the Student Migration Steering Committee. Members of the Steering Committee, while endorsing the substance and spirit of the Work Group recommendations, expressed concern about preserving campus autonomy of choice. They preferred an approach that would permit campuses to access Work Group recommendations and summaries of best practices, while preserving their own role as a Blue Ribbon panel largely engaged in broad policy recommendations to the Board of Trustees. From that meeting, a determination was made to disseminate a report containing recommendations for the Chancellor, system administrators, and campuses. The best practices contained in Appendix A to this report

will be useful for campuses to consider in developing local marketing plans and will serve as background for contextual reference for members of the Board. Simultaneously, the Work Group determined to identify with the Steering Committee policy/resolution issues for the Trustees.

The Extent of Student Migration from New York State

Characteristics of Out-of-State Institutions Selected by New York Students

Migration of prospective students from New York State is not a new issue. While the statistics have not appreciably changed in recent years, it nevertheless is a reasonable concern in a period in which the University could accommodate more students without increasing physical capacity. In "Campus Trends, 1996" published by the American Council on Education, 35 percent of administrators reported increases in enrollment from 1994-95 to 1995-96, but 39 percent reported decreases.[7] In such an environment, State University has done well to hold its own. The number of high school graduates dropped from 246,945 in 1976 to 157,086 in 1994-95; yet the rate of application to the University has increased from 29.5 per 100 students to 44.2 in 1995, and in fact remained level for the last four years. In terms of market share–numbers of enrollees per 100 resident high school graduates–though University Agricultural and Technical Colleges have declined by 13.3 percent, University Centers' share has increased by 14.3 percent and University Colleges' share has increased by 14.7 percent.

State University of New York offers a sound educational value; factoring state aid into total educational costs further underscores the advantage to students. At $323,599,095, total state tuition assistance to support attendance is the highest in the region. Aid per student also is the highest at $866–better than Connecticut's $587 or even Pennsylvania's $767. Additionally, factoring in state aid makes New York's net tuition, fee, room and board liability for 1995-96 the lowest in the region at $7,846; in contrast, Vermont's is $10,491 and Rhode Island's is $8,958.

The Fall 1994 migration of New York State residents to attend college out-of-state was 25,989 for first-time, full-time students.[8] Using a variety of estimation techniques including cohort persistence

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[7]Public institutions, both two- and four-year

[8]Most recent data available; these statistics are compiled every two years. These first-time students represent approximately 15 percent of the total college population at all levels.

in the public and private sector as well as simpler techniques, the State University System Administration Office of Institutional Research estimated that the total out-migrating New York State undergraduate population is in excess of 90,000 students; the total first-professional and graduate student population approximates 25,000, for a total estimate of 115,000 New York residents pursuing college educations out-of-state at any given time.

There are some positive indicators for the future. High school graduation rates are expected to increase in New York State over the coming decade (1996 – 2006) by 12 percent, according to the Western Interstate Commission for Higher Education. State University will need to maximize the opportunity to enroll greater numbers of resident students during this period.

The University cannot rely on the expectation that resident applicants will move the enrollment of qualified students to capacity or near-capacity, however. Therefore, other avenues of enrollment management must be explored.

Why Students Bypass State University

Most of the out-of-state institutions attracting New Yorkers appear to have one or more of the following characteristics: national reputations, a large array of programs, specialized programs, prominent athletics, and competitive overall living costs. The states of Connecticut, Maryland, Massachusetts, Michigan, New Jersey, Pennsylvania, Rhode Island, Virginia and Wisconsin led the nation in attracting New York students to their institutions. Florida's common course numbering throughout its community college and state university systems[9]–which are separate–offers ease of transfer to students. This tactic is an effective selling point for families interested in cost effectiveness and learning productivity.

New York residents who leave the state have slightly higher SAT scores than those who stay. Of New York students reporting scores to State University, those who actually enroll average 1038; those who choose not to enroll average 82 points higher, or 1120. Out-of-state students sending scores to State University campuses show a narrower gap, at 44 points: those who enroll within

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[9]John Kalb, Director of Institutional Analysis, Office of Budget and Analysis, Florida State University Administration

the system average 1077, and those who bypass our campuses average 1121.[10] State University analysts feel that this may illustrate a tendency among top-performing New York students to treat our campuses as a "safety" option relative to certain campuses.

On the other hand, out-of-state students perceive the quality of the State University and view it as a desirable primary option. This lends strength to the argument that resources should be reserved for recruiting out-of-state students. Moreover, such recruitment strategies could lead to an academically enhanced student profile for State University: in an analogous 1992 study conducted for Rutgers, The State University of New Jersey, principal investigators determined that students who performed poorly on the math portion of the Scholastic Aptitude Test were more likely to limit their interest to New Jersey schools; as test scores increased, the proportion of students indicating interest only in New Jersey declined dramatically. For top performing students (math SAT scores between 700 and 800), just 6.7 percent expressed interest only in New Jersey schools,[11] a trend that conceivably could benefit State University of New York. Affluence and parental education also registered as potent variables in the New Jersey study: students from families with greater income and higher levels of parental education were far more likely to look outside the state. Students from large cities were more likely than students from small cities and towns to migrate, presumably because their high school counselors provided more information about out-of-state possibilities. African American students, all other considerations being equal, also were more likely to leave the state; the New Jersey investigators hypothesized that this was due to interest in historic Black colleges. These data support the anecdotal information describing why New York State students migrate to other states.

As indicated earlier, the two key sectors in which State University has significant expansion opportunities are: 1) New York students who migrate to other states and 2) out-of-state (and international) students who may be persuaded to study in New York. Both groups must be developed. It bears reiterating: *We do not recommend developing the out-of-state/international sector to the exclusion of qualified New Yorkers; residents should receive the same considerations and guarantees State University always has extended to them. New York students should not be*

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[10]Figures are for university centers. It should be underscored that these are *averages*.

[11]*Out-Migration of New Jersey College Students: Causes and Consequences*, Bureau of Economic Research, Rutgers, The State University of New Jersey, August 1992, Co-Principal Investigators Jeffrey Rubin, Ph.D. and Joseph J. Seneca, Ph.D.

displaced under any circumstances. Nevertheless, we believe that as the University matures, it will achieve greater academic status and fiscal security by opening its doors more widely to highly qualified out-of-state and international students. Recruiting these groups is a sound step that represents an opportunity to bring the University nearer to optimal efficiency while enriching its cultural and academic profile, lowering the cost of education to all New Yorkers, and enhancing the State University as a tool for economic development. Expansion opportunities for the University appear to be greatest in the following sectors (including the previously-cited international sector):

1) Enhanced Targeting in Recruitment of In-State Students

University data can be used to identify high schools that yield significant numbers of well-prepared applicants. The University can improve its efforts to better capture existing high school populations. Enrollment management strategies can then be developed to ensure that campus and system offices are working to cultivate these schools.

2) First Year Students from Other States

As discussed elsewhere in this report, it will be in the best interests of the University to facilitate the admission of out-of-state students, with particular emphasis on those students whose families pay New York State taxes, work in New York, or reside in border communities only a short commute to State University campuses. If more out-of-state students fill campuses to capacity or near-capacity, the ability to spread costs among greater numbers of students will benefit resident New Yorkers.

The National Student Exchange (NSE), which the University already participates in to a limited extent, offers an intriguing prototype that can capitalize on this market while preserving all historic access assurances for resident students. Out-of-state students attend State University paying their in-state rate; this is characterized as an "exchange." The NSE is a consortium of colleges and universities throughout the U.S. and three U.S. territories that offers domestic exchange opportunities for faculty and undergraduate students. Students who wish to participate apply formally at the home campus; an application fee covers the cost of administrative services, application processing, and program overhead. The average application costs about $100.

Features of the exchange include tuition reciprocity across the United States. NSE has two main offices, one of them at Buffalo State College; and the State University has four participating

campuses: Stony Brook, Buffalo State College, Potsdam College, and Plattsburgh College.

To reiterate, benefits of this concept include:

- •the University operates nearer to capacity,
- •the out-of-state students pay their in-state resident tuition rate, and
- •New Yorkers continue to receive all traditional University admissions benefits and they win, additionally, from a broader sharing of educational costs.

Another possibility, if we chose not to invest our full effort in an external mechanism such as the NSE, would be to create a State University version of this program that would facilitate out-of-state recruitment. This ultimately may need legislative approval, but as an exchange program that will benefit both in- and out-of-staters, it may not.

3) The Adult Returning Student Population.

Irrespective of state of origin, these students have special needs–particularly in the areas of financing, scheduling, and child care–that campuses may wish to consider in devising marketing strategies. Those who have been out of school for extended periods also have developmental needs. The motivation of adult learners to enroll and to better themselves educationally and economically is strong when opportunity is present.

4) International Students.

Potentially a huge growth market for State University, these students, too, have special needs that must be met if problems of attrition are to be avoided; they particularly require social and academic support. The University has long welcomed international exchange students, and should continue to do so; but revenue growth will be produced by developing new markets of full-tuition-paying students as well. It is expensive to recruit foreign students, but the University's growing position on the World Wide Web should cut costs and broaden the number of prospective students reached. The Web also can be used as a mechanism for establishing a virtual international student community that links University campuses (suggestions for more general student applications follow in point four).

Coventry University in England has created an effective recruiting model worthy of emulation. They made significant inroads in recruiting academically talented, full tuition-paying Asian students by sending a Coventry representative to targeted Asian college fairs. Using a lap-top computer, the

representative processes both college applications and student immigration papers on site. A designated representative from each Coventry University department is on call to provide 24-hour admissions decisions for Asian candidates. In one 24-hour period, therefore, Coventry provides general admission, program admission, immigration papers, and even information about housing and student support.[12] It is no accident that Coventry is focusing on Asia, where families can afford to send students to study abroad, and where English proficiency and higher education are valued highly. Prospects generally are worse in Europe, where students and families are accustomed to receiving free higher education (unless the government or a corporate sponsor funds a State University exchange); and in Africa, again unless the government pays.

The University's extensive International Student Exchange Programs typically serve 5,000 students in any given year. These students represent a minority of registered students with visas within the University system; most are not on exchanges, and most pay full out-of-state tuition. However, a new consortium such as Santander, which represents 38 European colleges and universities, offers rich opportunities for cultural diversity on State University campuses, and for foreign study experiences for University students. Whether the establishment of such consortia can lead to significantly increased revenues must be determined by revenue and program specialists. Typically, international exchange agreements are painstakingly crafted country by country, and institution by institution. The complexity and entrepreneurial nature of these exchanges warrant a Phase II study, to determine whether they are a viable revenue booster, in addition to their value as enrichment and marketing mechanisms.

5) Transfer Students

State University has had a series of policies pertaining to the transfer of students, beginning on November 29, 1972, when the Trustees adopted a policy intended to guarantee to residents who possessed A.A. or A.S. degrees from its two-year colleges the opportunity to continue their educations at baccalaureate campuses within the University system on a full-time basis with junior-level standing.[13] Then-Chancellor Clifton R. Wharton noted in a March 26, 1980 memorandum to

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[12]Dr. Alex M. Shane, director, Office of International Programs, State University at Albany.

[13]G. Christopher Belle-Isle, Director of Transfer and Placement for Monroe Community College, makes the point that A.A.S. degree recipients historically have been forgotten in the context of articulation, though a number of programs at four-year SUNY campuses originally were designed for the A.A.S. degree; he urges guaranteed transfer for these students, as well.

the Trustees that, "I know the Trustees recognize that strong articulation ties exist among several (State University) units. However, I am also aware of your concern that many problems still are unresolved, and that the rate of progress has been slow." A 1980 Board resolution and a 1987 updated Transfer and Articulation Policy have effected some improvements, but significant problems remain in this area, making the transfer student sector particularly vulnerable to recruitment from private sector and out-of-state institutions who are heavily targeting this market.[14] In many instances, it is easier to transfer to other quality baccalaureate campuses than to transfer to another campus within State University. For that reason, the Florida common-numbering system cited earlier, and other protocols that ensure maximum credit retention for associate's degree students, should be of interest to campus and system experts concerned about ease of transfer as a marketing incentive.

6) Worldwide Market for State University Classes through Technology

Some campuses already offer classes via the Internet and other avenues of distance learning, and State University experts are preparing themselves to write asynchronous and interactive curricula for Web students. University campuses must seize the opportunity to pioneer distance learning if we are to avoid significant losses in this sector in the near future. The University of California at Berkeley already is offering degree programs to New York residents via the Internet. As more institutions follow this lead, traditional marketing boundaries will become meaningless and the University can expand its revenues and enrollment significantly without stressing the physical capacity of its traditional campus classrooms. Already, several campuses have made a mark on the information superhighway with interactive Internet programs, such as EngiNet and the State University of New York Learning Network. This is not an area in which the University can afford to wait to study developments and outcomes before it commits resources. As distance degree programs become more widely available and acceptable, out-of-state institutions offering high quality, low-cost study options students can undertake at home almost certainly will make some inroads against State University's traditional applicant pools. Because these programs are being developed in the forefront and are costly to originate, this is one sector that could benefit from

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[14]See "A Review of State University of New York's Transfer and Articulation Policies and Enrollment Initiatives" by Dr. Janet M. Edwards for the Offices of Access Services, Student Affairs and Special Programs, August 1993.

systemic and regional recruitment approaches.[15]

Student Perceptions of State University

There are a variety of reasons students choose non-State University colleges, some of which are based on misperceptions. For example, there is a persistent, deeply-rooted bias in the northeastern United States that favors the "prestige" of an independent college or university, even though statistics have demonstrated that many such colleges are less selective than comparable State University campuses.

Though it is frustrating–and difficult–for campuses to counteract misperceptions, no campus benefits from dialogues with its consumer-public about whether criticism or a downturn in public favor is fair or fact-based. In designing a master marketing plan, it matters what the perceptions of a target audience are. Entrenched negative word-of-mouth based on misperceptions may have outcomes just as damaging to a campus's enrollment as a fully documented problem. Therefore, any marketing process must begin with a rigorous and honest examination of how student consumers *perceive* State University campuses. If there are misperceptions injurious to the University's marketing position, these should be addressed. If there are learning opportunities for the University, including opportunities to refurbish institutional programs and/or infrastructures, to improve staff and pedagogical practices, to re-engineer student transactions in the interests of greater efficiency and accountability, and to adopt best practices both from within the University and from external review of successful peer institutions, we must explore them.[16]

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[15] The September 1996 volume of *WGU News* reported that The Western Governor's University will expand higher educational opportunities by using advanced information technology to cross state and institutional lines; Governors Mike Leavitt of Utah and Roy Romer of Colorado serve as lead governors for the initiative. An electronic catalog or advisor will be developed which will allow students to identify skills they already have or may need to receive certification or a degree. It also will enable students to sign up for and take courses and will assist in assessing their mastery of learned skills.

[16] While we unilaterally endorse best practices initiatives, it should be noted that an unexpected outcome of *Rethinking SUNY* with its emphasis on healthy campus competition has been a newly widespread and entrenched reluctance on the part of campuses to share their successful marketing and enrollment strategies and techniques. Recently, in both an enrollment manager meeting and a presidential office poll, most campus representatives stated that they would prefer to keep their effective strategies as privileged information. Therefore, the recommended best practices initiatives will require great sensitivity and expertise if useful information is to be elicited. As campuses adjust to the new competitive paradigm, it may be necessary to utilize nationally-renowned experts who are willing to assist them in importing the best practices of successful university systems and colleges from outside New York State.

Synthesizing concepts advanced by P.F. Drucker, S.J. Skinner, and others, Professor Stephen J. Winter of the Orange County Community College Department of Business Management advances the following arguments for the creation of an institutional marketing plan:

- It serves as a strategic/operational road map and unifying force.
- It enables administrators, faculty, and staff to work more participatively.
- It provides an early warning system regarding problems, opportunities, and threats.[17]

Moreover, State University must develop a strong internal marketing culture as a precursor to carrying out external marketing programs.

Conditions and Control

The array of conditions currently impacting University enrollment include some factors we will be able to influence and a number of factors outside our control. The Trustees' Committee on Revenue and Tuition determined that families need the ability to plan how much tuition increases will be, and when they will occur. The Board has been receptive to this concern, as evidenced by forthcoming decreases of tuition rates at the Colleges of Agriculture and Technology and an endorsement of the concept that tuition needs to be predictable.

Though we are experiencing declines in student enrollment on some campuses, this development cannot factually be attributed to diminution of the University's academic profile.[18] Such evidence seems almost beside the point, however, when we reflect anew that student perceptions of colleges may or may not be logic- or fact-based. Indeed, it is the rare student who selects a campus based primarily on quantitative data. Casual impressions, peer influence, family and school counselor input, word-of-mouth, the reputation of programs, campus atmosphere, and legacy considerations

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[17] Abridged from "Dissolving the Jello Dilemma in Academia, A Recipe for a Marketing Plan," presented at the 13th Annual Conference of the Center for Faculty Evaluation and Development, February 1996.

[18] In fact, mean SAT scores of New York residents who sent their scores to State University colleges increased last year in comparison to the 1993 and 1991 profile data from The College Board. In 1995, the mean scores were 445 verbal and 509 math. In contrast, the 1993 means were 439 verbal and 502 math, while in 1991 the means were 436 verbal and 499 math.

may carry considerable weight in the dynamic of educational marketing. Campus amenities, attractiveness and maintenance of facilities, student service options, and location also play roles in student selection.

Playing to Our Strengths:
State University's Student Opinion Survey

The Work Group determined that positive word-of-mouth from currently-enrolled students was a compelling factor in college choice. If currently-enrolled students report an exciting, intellectually stimulating experience to State University prospective students, the University gains an inestimable advantage. Therefore, it is particularly important to review what these incumbent students are saying. Through their feedback, the University will gain an understanding of how to improve its climate and services, and by extension, how to cultivate better student-to-student marketing.

The 1994 State University Student Opinion Survey provides a logical starting place for the review of student perceptions of the University and about student life. This project involves the administration of a survey by a campus to currently enrolled students; during 1994, over 50,000 students were sampled. In areas that may impact student enrollment choices, the American College Testing (ACT)–the surveyor of record–reported the following areas as needing attention (state-operated campuses): residence hall services and programs, conditions of residence hall facilities, campus help with finding part-time jobs, campus food services, and parking facilities.

Registration procedures in general and availability of courses students want at times they can take them also were cited.[19]

Areas of strength were perceived to be library facilities, library services, access to computing services and facilities. In the key area of "Quality of Instruction," students registered high satisfaction averages overall. To indicate how large a contribution the campus had made to students' growth/preparation, State University respondents gave closer to "large" than to "moderate" average ratings in the areas of intellectual growth, preparation for further study, personal growth, and preparation for life-long learning. Representative items receiving high ratings were:

- sufficient challenge offered by program of study

[19]This was the only item rated lower-than-neutral by State University community college respondents.

•quality of instruction.

Faculty items received high ratings in the following areas:

•faculty members come to class well-prepared

•faculty respect for students

•out-of-class availability of instructors.

Slight increased concern about graduating on time was noted from the 1991 to the 1994 survey. From these data, it is evident that campuses have an opportunity to build on positive student opinion, including the marked positive impression faculty left with their students.

System Administration Support and Campus Enrollment Management

State University's prospective students are a diverse lot, requiring targeted recruitment strategies and programs that foster interest and enthusiasm from prospective students. We believe that without a detailed campus-by-campus marketing plan (employing cooperative as well as competitive strategies), several campuses will be impacted adversely by reduced opportunities to highlight their distinctive values, quality, and student benefits. The ability of State University campuses to realize enrollment objectives will depend on the clarity and persistence with which their messages of access, diversity, quality, and affordability are communicated.

Institutional durability continues to be a common theme for State University campuses. The abilities to adapt and thrive in a changing environment will be essential as the campuses strive for academic and market positioning. The ability to sustain a healthy flow of students by enhancing relationships and communication with school counselors and secondary school opinion leaders will help shape the enrollment vitality of campuses.

Rethinking SUNY emphasizes the need for campus self-sufficiency, entrepreneurial innovation, and greater campus creativity, and we endorse these concepts. Existing outreach and recruitment programs currently offered by campuses and system offices such as Financial Aid Services and School/College Relations are characterized by their ability to complement each other's efforts. Services of these offices should be even more acutely focused on high schools graduating well-prepared students who are bypassing our campuses. A comprehensive review of institutional placement statistics will help administrators to identify the appropriate high schools on which to focus.

State University already is serving an instrumental role in facilitating technological partnerships between its campuses and secondary school counselors. For example, at this point approximately 50 prospective students are now inquiring and/or actually applying to our campuses each day via the World Wide Web. It is necessary to remain at the forefront of new technologies as more high schools are connected to State University in initiatives such as New York Wired, and as more families go on-line from residences.

A Review of Priorities

The Chancellor and System administrators should lead the campaign for the adoption of better management and marketing practices. The Chancellor should continue to adopt system-driven initiatives designed to enhance the University's enrollment and retention profile; such initiatives should be crafted following significant consultation with campuses.

At the same time, campus administrators and faculty are in the best positions to make informed choices regarding specific strategies to stabilize/increase their own enrollments. They are expert in regional issues, well-versed in the extent of resources available for competing needs to produce enrollment and retention turnaround, and knowledgeable about the precise requirements of their student-clients. Further, it is the reputation and quality of their programs that ultimately allow marketing initiatives to succeed.

Appendix A, the menu of enrollment management suggestions and best practices, is offered to campuses not as administrative mandates, but as expert recommendations for consideration. Review by campus administrators, faculty, and professional staff will result in informed determinations about which options will be appropriate to include in individual campus enrollment strategies; many of the practices already are in place. It is particularly important for faculty to be part of the campus process of review, as they often have the most direct contact with students. The most enduring marketing strategy is based not on campaigns or slogans (i.e. image), but rather on continuous quality control and improvement (i.e. reputation). Faculty insights about strategies to create closer and better teacher-student interactions, including plans for specific roles they can play in attracting new students and enthusiastically engaging current ones, will enhance campus word-of-mouth and broaden interest from prospective students.

Campuses must recognize that funds they earmark for their admissions offices–in terms of staffing, office appearance, initial and follow-up communications, etc.– are *investments*,

expenditures that will yield interest in the form of heightened future revenues. Every effort should be made to preserve staffing and when possible to augment these offices. Focused training should be provided for admissions employees that will emphasize the point that they are indispensable front-line representatives of the University. Their sensitivity to prospective students, their efficiency, and their service-oriented attitudes will be crucial tools in the tasks of attracting new students and resolving problems of attrition.[20] Enrollment managers should work in partnership with faculty members, alumni, students, parents/guardians, and administrative staff. Campuses that have not yet activated Admissions Advisory Boards can convene them. Without the active leadership of presidents, including their commitment of resources, such initiatives run the risk of floundering.

Campus financial aid offices also are vital to effective enrollment and retention strategies, not only for their primary function of processing financial aid packages, but also because they provide information services and support to prospective and continuing students and families. Because financial aid largely is driven by external sources of student support, staff must receive thorough and timely training and have access to extensive support mechanisms. State-of-the-art systems are crucial in this area, because without processing efficiencies, little time is available for the counseling and student relations activities which result in enhanced enrollment and retention. Staff efficiency, effectiveness, and responsiveness to student and family inquiries are critical because ability to pay expenses and method of payment greatly influence college choice. State University has serious competition from in- and out-of-state private institutions in this area, mainly because their large investment of operating funds in financial aid (which translates into tuition discounting), has been accompanied by an investment in staff support, computer system resources, and office space and design. Each financial aid office should examine its practices to determine if there are ways to reach out and be more responsive to student and family needs. Investment of campus

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[20]In a speech at the 1996 Campus Convocation at Cobleskill, Vice Chancellor for University Relations Scott W. Steffey stated, "If I can draw an example from the corporate world, I'd mention UPS. I am certain that when I say UPS the image in your mind is of a brown-uniformed delivery person courteously delivering a package to your door. Well, UPS knows that that's where their reputation begins. In fact, UPS understands that its reputation is only as good as its delivery people...it forms its impression at the point of contact...we can all take a lesson from UPS. The most important impressions of your organization are formed at the point of delivery. And everything and everyone counts: the voice on the telephone, the condition of the lawns and the roadways, the willingness–or unwillingness–of someone in the business office to go the extra distance to sort out a problem. An impression is formed every time someone from the greater world comes into contact with your organization."

resources in these aid-related activities should heighten campus enrollment profiles, as well as prepare campuses to manage new campus-based resources dedicated to locally determined forms of financial aid.

A Successful Financial Aid Model at Brockport

In the absence of significant endowed scholarship funds and without the ability to discount tuition, some State University Financial Aid Offices have turned marketing focus on the scope and quality of their services. Good service does not replace direct grant assistance or tuition discounts–campuses should pursue all available opportunities to develop their own grant and scholarship resources–but it is essential in meeting enrollment management goals.

The Financial Aid Office at the State University College at Brockport has a strong track record of innovative and creative promotion of its services to students and parents. As charter participants in the U.S. Department of Education's Direct Loan Program, Brockport promoted itself as one of only a handful of institutions across the country to participate in the initial year of direct loans to students.

Brockport also was an early participant in the U.S. Department of Education's Quality Assurance Program; the college won a prestigious national award from the Department for its work and for

the management improvements it developed as part of Quality Assurance. The college used the award to promote itself to students and parents as service-oriented and innovative.

Most recently, the college established a touch tone student information system through which students and parents/guardians can make inquiries and get information at any time about the status of pending applications and awards.

Enlisting Nontraditional Allies for Enrollment Management

It is desirable for campuses to tap the expertise of a significant number of offices that have not been traditional participants in recruitment and retention initiatives. For example, State University Career Development Offices (CDOs) often work with regional employers to encourage the enrollment of their employees in degree programs. They also recruit for specialized programs and counsel academic administrators on opportunities to provide inventive new majors to meet emerging labor demands. Only rarely, however, are CDO administrators included in recruitment initiatives, though

job access is a key factor in recruiting new students. Offices of Alumni Development also are particularly well positioned to help campuses build enrollments.

As campuses engage greater numbers of their professionals in the recruitment and retention process, and as they accept new recruitment strategies suggested by staff members with fresh perspectives and contacts–inviting additional key players from the campus "family" to adopt, craft, and carry out innovative recruitment techniques–enrollment numbers should rise. Students, faculty, and staff members traditionally respond to appeals to their creativity and to a sense of shared ownership of projects; Admissions Offices are in need of additional assistance. Enrollment managers will benefit greatly, therefore, from team-building and advisory structures that will make recruitment challenges true campus-wide challenges, rather than isolated and mechanistic charges to one or two offices. *Enrollment management is not an admissions office project but rather a campus-wide responsibility.*

There also are initiatives involving off-campus contacts that may benefit campuses. Enrollment managers should seize every opportunity to strengthen ongoing relationships with their regional secondary schools, and to pioneer new partnerships with the secondary community. Operation Inform and the School-to-Work Outreach Project are two such programs. Existing programs within the University, such as SUNY's Best, University in the Schools, and the College Transition Course acquaint students with the University's quality by giving them a preview of positive higher education experiences: a class with an outstanding postsecondary teacher, a college credit in high school, critical thinking skills training. While these are not, and should not be construed as, recruitment activities *per se*, they engender good will and plant the seeds for productive later relationships with prospective students, their teachers, and counselors.

Case Study:
A State University Campus Initiates a Successful Turn-around

One four-year State University campus conducted a rigorous self-examination and retooling of strategy, including allocation of resources, which resulted in a successful enrollment turnaround and potentially could be a model for some other campuses. In 1994, faced with declining applicant pools and declining enrollment, State University College at Potsdam engaged a private consultant to analyze the strengths and weaknesses of the College's marketing and admission strategies and to prepare a new recruitment plan. Although Potsdam began implementation of the plan in fall 1994, the 1995-96 recruitment year was the first in which the campus was able to take full advantage of

the strategies proposed.

During the past two years, Potsdam's enrollment picture has improved considerably, with the most dramatic increases reflected in fall 1996 numbers. As of June 27, 1996, the campus had 803 active first year student deposits, compared to 663 at the same time in 1995 and 627 in 1994. Potsdam accomplished its turnaround in first year student deposits by changing its philosophy toward recruitment and admission and by adopting a series of strategies recommended by the consultants. The philosophical change is a profound one. Beginning with admission and financial aid offices and extending across campus, the faculty, staff and students of the college committed themselves to assisting in recruitment and admission efforts. Enrollment became everyone's problem and priority. Help took the form of volunteers from many offices assisting in the direct mail program; faculty writing to, meeting with, and telephoning individual students, and student organizations hosting recruitment events. The President made it clear that these activities were valued, and even in times of severe budget cutting, Potsdam's budget committee made large investments in the recruitment budget of the admissions office.

The consultants began with an analysis of the successes and failures of strategies then in place. Based on that analysis, they recommended a decrease in resources reserved for travel and a much more aggressive approach to the cultivation of inquiry and applicant pools. Strategies included the extensive use of the College Board's Student Search Service to increase the inquiry pool; use of direct mail to prospective students, including alumni testimonials of the value of their Potsdam experience; telemarketing by students, faculty, admission and financial aid staff; and timely and strategic packaging of financial aid to admitted students. Also, the college moved from precipice (deadline) to rolling admission to ensure greater flexibility and sent early positive signals to students submitting strong SAT scores. The significant improvement of the Application Processing Center's processing time was also crucial to the success of this part of the model. The entire strategy is labor intensive, involving continuous contact with prospective students. Implementation of the marketing plan is continually modified based on an analysis of results produced by individual strategies. Although the plan did not result in an increase in the first year student applicant pool, it allowed Potsdam to increase its paid deposits, which is indicative of an applicant pool that is overall more interested in the campus. Years of decline ended and stabilization of application numbers was achieved at a time when some other State University four year institutions

were experiencing declines.[21]

Summary

Specific next steps the University can take to improve outcomes are outlined on **page 33** of the report. Recommendations and best practices for campus consideration begin on page 27. In addition, presidential input will be circulated to the full Board of Trustees and campus presidents at a later date. Some recommendations can be implemented immediately if campuses choose. Others are more intricate and will take longer. Therefore, we have provided timeframes for implementation. We also have identified which initiatives would best be driven by campus, system, and regional participants in the process.

As the University moves toward enhancing underdeveloped markets and retaining the maximum number of students in New York State, the Work Group recommends continuing cooperation and exchanges of information among campuses, system administration, external consultants, and key stakeholders such as alumni and students.

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[21] Jean A. Scott, Acting President, State University College at Potsdam, July 10, 1996.

Appendix A

Recommendations and Best Practices For Campus Consideration

MENU OF RECOMMENDATIONS

The following best practices and recommendations are offered to State University campus administrators for their consideration by system experts on the Student Migration Work Group, with the caveat that not all recommendations will be appropriate for all campuses. In all cases, initiatives will be more effective when tailored to the unique circumstances and conditions of an individual campus.

MARKETING

Short Term Objectives (To be implemented as soon as possible)

- Utilize institutional data to help campuses better target high schools. (system, campus)
- Utilize consumer focus groups (both student and parent/guardian) to identify aspects of resistance to State University and to assist in the crafting of solutions. (system)
- Expand and publicize family-friendly time payment plans and, for future students, support the New York State pre-paid tuition plan. (system, campus)
- Develop an action plan for the international student community and establish a virtual, interactive system of international student support on the Internet. (system, region, campus)
- Lay necessary groundwork to broaden the definition of "New York State resident" as it pertains to education and consider other innovative pricing options. (system)
  - Include out-of-state residents who work in NYS and pay NYS taxes.
  - Give special consideration to residents of border communities.
  - Petition the Legislature for a special tax credit for newly-arrived NYS residents who do not meet traditional residency criteria.
  - Study options for long-time NYS residents who must leave the state, yet want their children to attend State University campuses.
- State University should enlarge its admissions/recruitment position on the World Wide Web. (campus, region, system)
- Pool campus resources, when possible, to recruit as regional (or other) consortia. (region)
- Systematically study successful direct mailing techniques and implement them (campus,

region, system).

- State University should recognize that it is serving many publics. Promotional materials should be targeted precisely, rather than too generally, for maximum effectiveness. (system, region, campus)
- Positioning of campuses relative to their competitors will be strengthened by systematic review, evaluation and upgrading of academic and student affairs programs. (campus)
- State University offices that directly serve prospective students, parents/guardians, and high school counselors should be appropriately staffed and provided with necessary resources to attract and retain students. (campus)

Longer Term

- Create a master marketing plan to attract students to New York and State University campuses. Ensure that plan designers are fully informed regarding demographic and socio-economic trends influencing student choice. Implement plan recommendations; identify appropriate roles for campuses, collaborations, and the System Administration. (system, with campus input)
- Through its actions, State University should position itself as a system where it is possible to earn a high-quality degree in a variety of ways, including a compressed time frame based on sound principles of learning productivity. (system, campus)
- Existing ambassadorial programs such as SUNY's Best and the College Transition Course, which provide support and academic enhancements for high school students, should be supported as tools that promote ongoing good will with high school counselors and administrators, as well as prospective students. (system, region, campus)
- Encourage enrollment, admissions, and financial aid professionals to play an active and highly visible role in educating school counselors regarding technological tools which enhance the college search process. (system, region, campus)
- Support and maximize use of existing initiatives that have proven effective, such as the Access Services Advisory Council and Operation Inform to market State University to the secondary guidance community. (system, region, campus)
- Build on existing programs to develop the international community; develop a marketing presence in targeted foreign markets. (system, region, campus)
- Build on existing programs that assist school counselors, parents and guardians, and admissions and financial aid staff.

ACADEMICS

Short Term (To be implemented as soon as possible)

- Promote campus "guarantee" programs that **ensure** that students can complete bachelor's degrees in four years. (campus)
- Refocus faculty attention on students and reward faculty who mentor students effectively; encourage greater use of faculty as academic advisors. (campus)
  - Institute student "check in" and comprehension monitoring procedures.
  - Institute symposia on effective faculty-student interaction.
  - When scheduling, make faculty-student interaction a high priority.
- Support campuses by creating a Chancellor's Best Practices Institute that will disseminate information that potentially can have an effect on upgrading the University in all key areas, with a special emphasis on academic excellence, administrative economies, and effective marketing. (system)
- Offer campus Best Practices Clinics for faculty, administrators, and professional staff who interact with students. (system)
- Aggressively recruit high-achieving students, who will enrich State University student profiles and who will continue to contribute to the University following graduation. (system, campus)
  - Honors programs with existing incentives for such students should be identified and broadly marketed.
  - New incentives, including campus-based financial aid and merit scholarships, should be initiated.
  - Special privileges, residence halls, a variety of honor diploma designations, database access, etc., should be encouraged for gifted, high-achieving and serious students.
- Recognize that while the University should pursue through all possible avenues the certified (via GPA and test scores) high-achieving high school graduate, the University also has a responsibility to interpret talent broadly and to cultivate student gifts that have not emerged prior to high school graduation. (system, campus)
- Programs such as the State University College at Brockport's Summer College Transition Program permit students to complete degree requirements and to enter the workforce as professionals when they would not have been admissible under traditional standards. Such programs are worthy of replication. (campus)

Longer Term

- Encourage a broad range of academic programs and choices. (system, campus)
  - The job market is one of many factors to be considered in developing State University curriculum offerings.
- Create campus "First Year Sophomore Programs" for gifted students and/or students with significant Advanced Placement credit, to permit guaranteed degree completion in three years. Market this option aggressively both to in-state and out-of-state students. (campus)
  - We believe that, with the promise of three-year completion, large numbers of high-achieving students will be attracted to State University (both NYS and out-of-state students).
- Focus on cultivating student problem-solving skills, such as critical thinking skills, which can be taught across the curriculum. (system, region, campus)
- Invest in faculty development and professional training. Continually introduce faculty to new and creative teaching methodologies, such as inquiry-based learning, critical thinking skills instruction, and use of new and evolving technologies. (campus)
- Endorse the Faculty Senate grant-writing initiative. Ensure that all faculty are trained in grant-writing and have resources necessary to research and write winning grant applications. (system, campus)
  - Offer coaching, database access, conferencing, etc., that go beyond current approaches. Encourage all teaching and professional staff to seek grants and enrichment opportunities.
- Encourage greater collaboration with K-12 schools in implementing "State University Expectations of College Entry-level Knowledge and Skills" recommendations. (system, campus)

TRANSFER AND ARTICULATION

Short Term (To be implemented as soon as possible)

- Recognize cost and convenience factors that impact the important (largely place-bound) adult learner segment. Meet the needs of this large and significant constituency. (system, campus)

Longer Term

- Through distance learning, Empire State College, Advanced Placement exams, etc., a student may earn a bachelor's degree and never set foot on a four-year college campus. This is not a new idea, but a concept whose time has come. State University should assume a national leadership role in permitting students to fulfill degree requirements in innovative and flexible ways. (system, region, campus)
- Existing transfer and articulation agreements within State University—there are many—should be prominently marketed in admissions materials. They also should be publicized broadly. (system, campus)
- Establish a system-wide database of articulation agreements that can be accessed directly by faculty and students.
- Promote recognition from campuses of the A.A./A.S. degrees as meeting all general education requirements, ensuring that transfers matriculate with full junior standing. Consider full matriculation for A.A.S. Students in parallel programs, as well. (system, campus)
- Individual campuses may wish to review specific recommendations outlined in "A Review of SUNY's Transfer and Articulation Policies and Enrollment Initiatives," August 1993[22]
- Establish an exchange program between faculty of community colleges and baccalaureate/graduate campuses to promote greater collaboration and understanding of respective curricula and students. (campus)
- Establish a standard format for articulation agreements. (system, campus)
- Study and consider how adoption of common course numbering such as Florida's could assist in developing the transfer student market share.

THE NEXT STEPS (PHASE II):

- Overwhelming system support exists for the development of a comprehensive marketing plan that should include campus-by-campus analysis. In Phase II of the Student Migration review, we recommend that such a plan be developed. Appropriate external consultants should be brought into the process, to supplement the expertise of State University practitioners and specialists. In addition, campuses or regional consortia will need to devise strategies specific to their circumstances, markets, resources, priorities, and needs.

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[22]Op. Cit.

- The Steering Committee should identify broad policy issues impacting issues of student migration. Appropriate resolutions should be drafted and presented.

- The 1997 Student Opinion Survey should go forward as planned, and its results should be reviewed carefully by campus and system experts, with a view toward correcting inadequacies and building on strengths. An Alumni Survey should be commissioned and studied toward the same end.

- Targeted marketing programs should be devised for specific sectors of the student population.

- A system-wide Enrollment Management Summit should be scheduled, with best practices from national experts to be disseminated to State University practitioners.

- Policy questions, such as differential funding structures that would permit the establishment of campus-based financial aid, must be addressed.

- System and campus assessment plans must be created and implemented to measure the efficacy of marketing initiatives. These initiatives should be evaluated regularly, to accommodate changing conditions.

Appendix B
Student Migration Steering Committee
Student Migration Work Group

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Student Migration Steering Committee

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